

Evergreen Area Retail Study APPENDICES AND MAPS

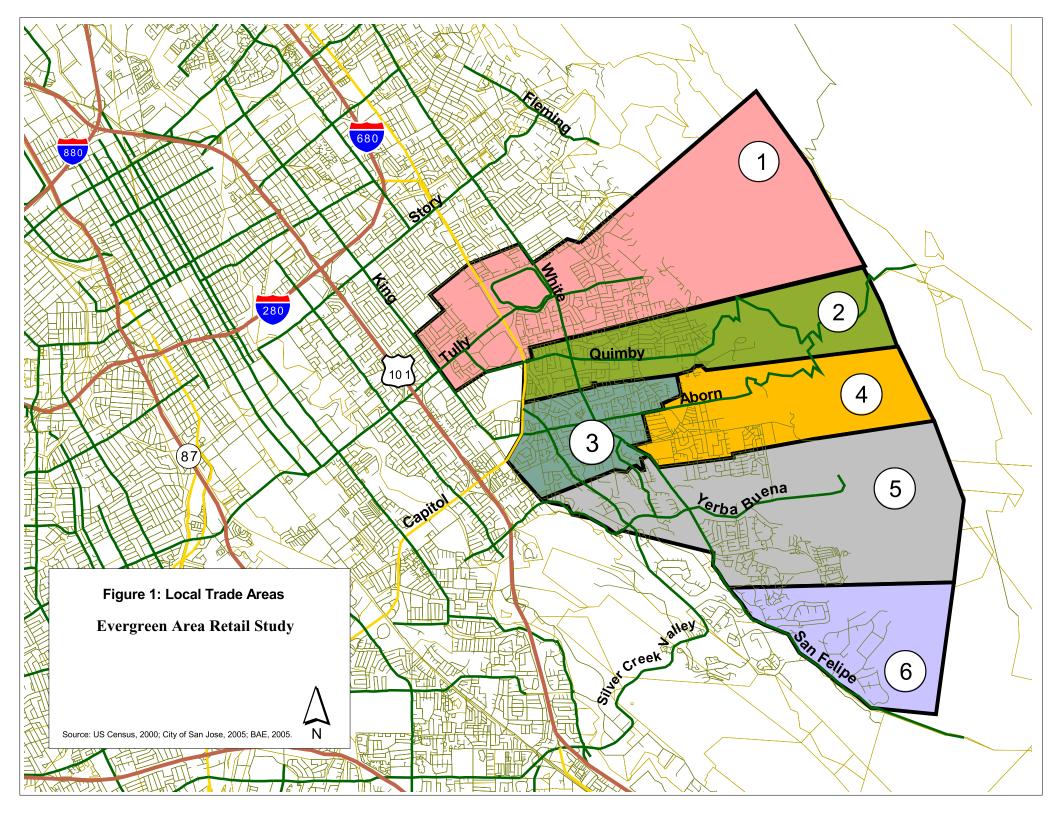
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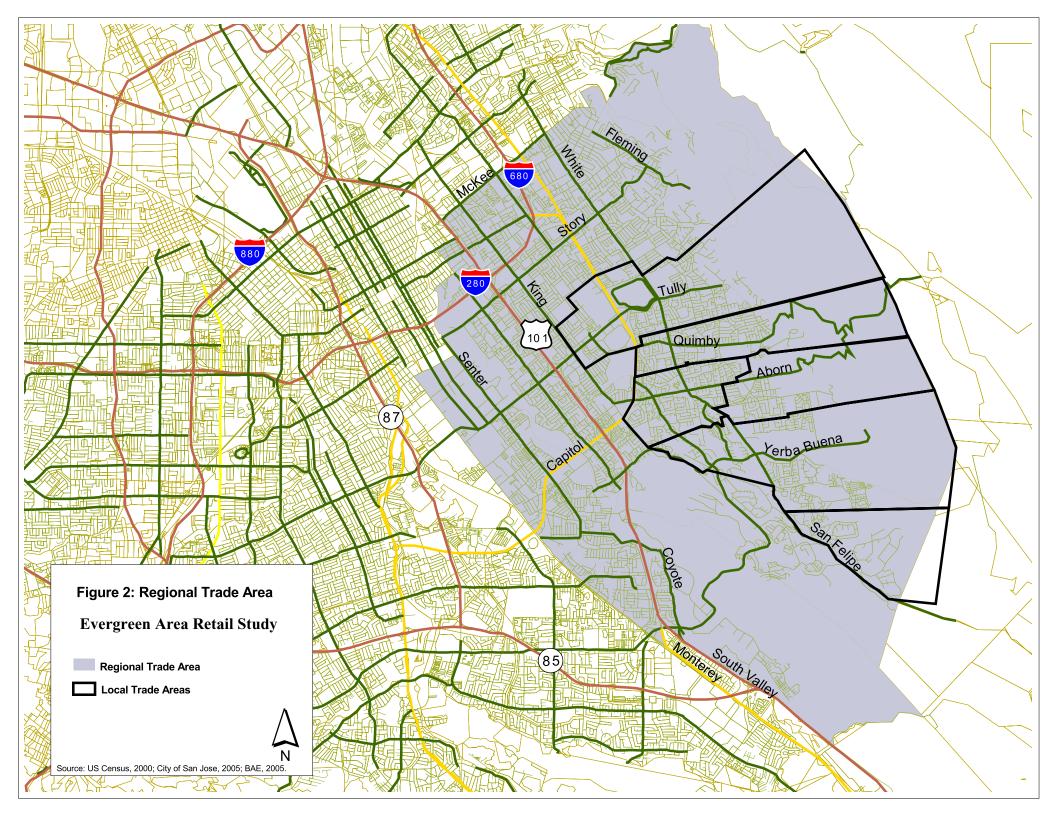
Office of Economic Development and Planning Department City of San José

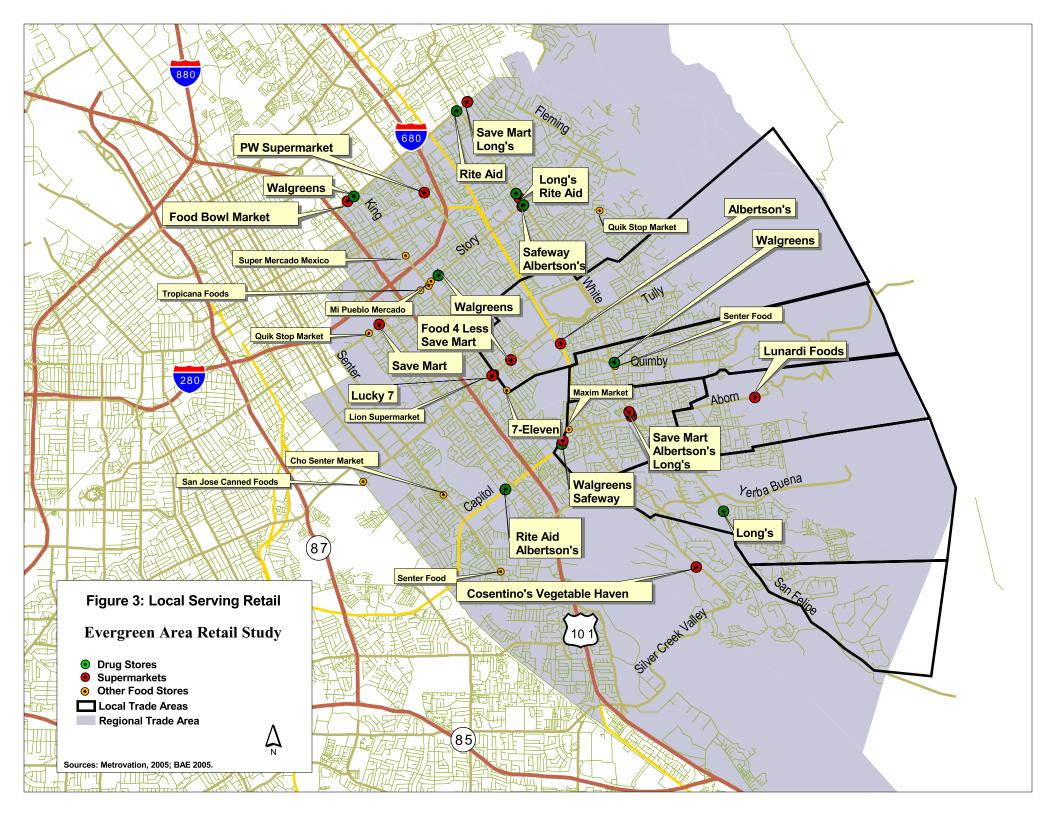
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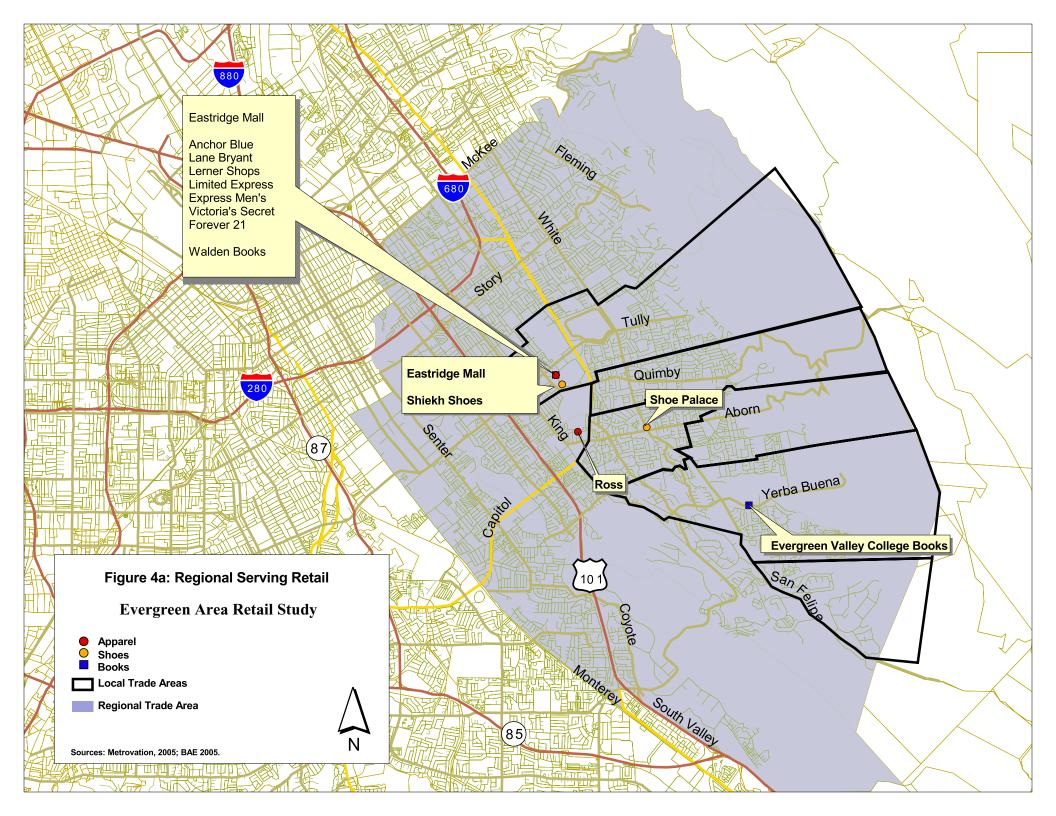
Metrovation Bay Area Economics (BAE)

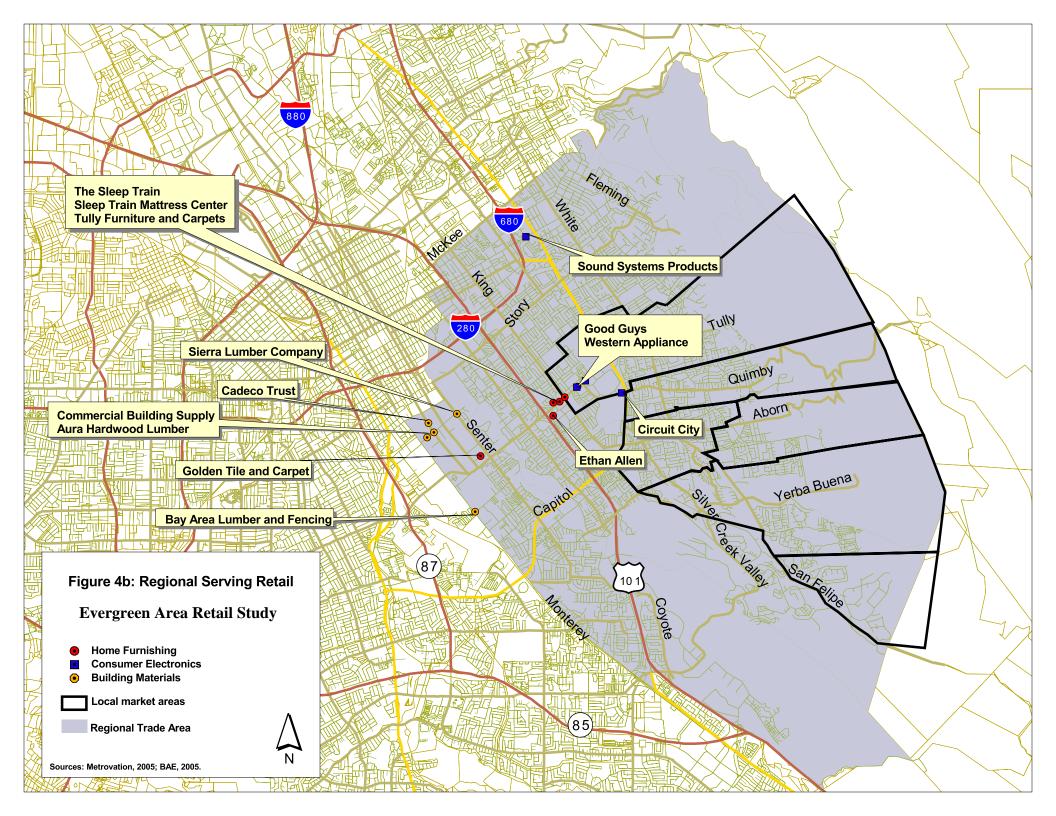
Appendix Tables & Maps











Appendix Table 1: Taxable Sales Trends in San José and California, 1997 to 2003 (a)

All figures in \$1,000s, and adjusted for inflation to 2003 dollars.

Retail Sales Category	1997 (b)	1998	1999	2000	2001	2002	2003	% Change '97-'03	Annual Avg. % Change
,									
San José									
Apparel stores	\$297,214	\$295,755	\$305,883	\$340,550	\$347,116	\$352,730	\$372,107	25.2%	3.8%
General merchandise stores	\$1,197,651	\$1,249,118	\$1,293,162	\$1,360,229	\$1,261,315	\$1,173,559	\$1,145,069	-4.4%	-0.7%
Food stores	\$396,572	\$406,034	\$419,099	\$436,530	\$434,251	\$416,139	\$397,685	0.3%	0.0%
Eating and drinking places	\$811,595	\$842,659	\$880,701	\$954,399	\$931,254	\$888,930	\$898,859	10.8%	1.7%
Home furnishings and appliances	\$349,151	\$372,147	\$407,496	\$452,965	\$391,229	\$359,700	\$336,072	-3.7%	-0.6%
Bldg. matrl. and farm implements	\$582,482	\$657,747	\$686,735	\$779,007	\$754,778	\$749,830	\$737,588	26.6%	4.0%
Auto dealers and auto supplies	\$1,395,488	\$1,505,336	\$1,652,791	\$1,902,785	\$1,644,104	\$1,475,451	\$1,463,891	4.9%	0.8%
Service stations	\$539,485	\$492,953	\$663,936	\$836,793	\$792,835	\$669,135	\$744,517	38.0%	5.5%
Other retail stores	\$1,409,720	\$1,519,435	\$1,754,784	\$2,009,569	\$1,680,172	\$1,442,547	\$1,362,282	-3.4%	-0.6%
Retail Stores Totals	\$6,979,358	\$7,341,184	\$8,064,586	\$9,072,827	\$8,237,055	\$7,528,022	\$7,458,070	6.9%	1.1%
All Other Outlets	\$4,010,255	\$4,157,643	\$4,429,506	\$5,477,085	\$4,599,572	\$3,404,750	\$3,373,127	-15.9%	-2.8%
Totals All Outlets	\$10,989,613	\$11,498,827	\$12,494,093	\$14,549,912	\$12,836,627	\$10,932,771	\$10,831,197	-1.4%	-0.2%
CALIFORNIA									
Apparel stores	\$13,213,807	\$13,244,042	\$12,649,939	\$13,733,841	\$13,910,593	\$14,351,872	\$15,179,710	14.9%	2.3%
General merchandise stores	\$41,858,618	\$43,779,688	\$46,972,867	\$48,991,590	\$49,031,466	\$49,602,089	\$50,550,818	20.8%	3.2%
Food stores	\$18,249,232	\$18,192,822	\$18,964,388	\$19,642,231	\$19,557,707	\$19,387,294	\$19,407,823	6.3%	1.0%
Eating and drinking places	\$32,378,910	\$33,921,966	\$35,832,093	\$37,908,590	\$38,286,312	\$38,955,666	\$40,049,699	23.7%	3.6%
Home furnishings and appliances	\$11,039,301	\$11,894,084	\$13,222,423	\$14,530,814	\$13,852,130	\$14,304,903	\$15,104,217	36.8%	5.4%
Bldg. matrl. and farm implements	\$20,164,892	\$21,860,991	\$24,567,164	\$26,516,880	\$27,493,236	\$28,719,960	\$30,693,755	52.2%	7.3%
Auto dealers and auto supplies	\$43,572,022	\$47,871,412	\$54,162,934	\$60,642,248	\$63,146,103	\$65,289,032	\$67,052,141	53.9%	7.4%
Service stations	\$22,138,513	\$19,588,377	\$22,429,921	\$26,948,666	\$25,585,416	\$24,478,703	\$27,714,635	25.2%	3.8%
Other retail stores	\$46,351,688	\$48,646,522	\$53,368,953	\$57,960,508	\$54,557,864	\$53,459,870	\$54,464,256	17.5%	2.7%
Retail Stores Totals	\$248,966,984	\$258,999,904	\$282,170,682	\$306,875,368	\$305,420,825	\$308,549,389	\$320,217,054	28.6%	4.3%
All Other Outlets	\$141,924,029	\$146,151,205	\$153,618,132	\$165,466,998	\$153,315,920	\$142,542,557	\$139,879,414	-1.4%	-0.2%
Totals All Outlets	\$390,891,013	\$405,151,109	\$435,788,814	\$472,342,366	\$458,736,745	\$451,091,946	\$460,096,468	17.7%	2.8%

Notes:

⁽a) In thousands of dollars

⁽b) All figures are inflated to 2003\$ using the San Francisco-Oakland-San Jose CPI for all Urban Consumers. Sources: MBIA; State Board of Equalization; BAE, 2005.

All figures adjusted for inflation to 2003	dollars.							% Change	Annual Avg
Retail Sales Category	1997 (a) (b)	1998	1999	2000	2001	2002	2003	'97-'03	% Change
San José									
Apparel stores	\$413	\$392	\$383	\$402	\$383	\$385	\$405	-2.0%	-0.3%
General merchandise stores	\$1,664	\$1,654	\$1,620	\$1,605	\$1,391	\$1,281	\$1,245	-25.2%	-4.7%
Food stores	\$551	\$537	\$525	\$515	\$479	\$454	\$432	-21.5%	-4.0%
Eating and drinking places	\$1,128	\$1,115	\$1,103	\$1,126	\$1,027	\$970	\$977	-13.3%	-2.4%
Home furnishings and appliances	\$485	\$493	\$510	\$534	\$432	\$393	\$365	-24.7%	-4.6%
Bldg. matrl. and farm implements	\$809	\$871	\$860	\$919	\$833	\$818	\$802	-0.9%	-0.1%
Auto dealers and auto supplies	\$1,939	\$1,993	\$2,070	\$2,245	\$1,813	\$1,610	\$1,592	-17.9%	-3.2%
Service stations	\$750	\$653	\$832	\$987	\$875	\$730	\$810	8.0%	1.3%
Other retail stores	\$1,959	\$2,011	\$2,198	\$2,371	\$1,853	\$1,574	\$1,481	-24.4%	-4.5%
Retail Stores Totals	\$8,462	\$8,608	\$9,151	\$10,012	\$8,745	\$8,031	\$8,111	-4.2%	-0.7%
All Other Outlets	\$5,572	\$5,504	\$5,549	\$6,461	\$5,073	\$3,716	\$3,668	-34.2%	-6.7%
Totals All Outlets	\$15,269	\$15,222	\$15,651	\$17,165	\$14,159	\$11,931	\$11,779	-22.9%	-4.2%
CALIFORNIA									
Apparel stores	\$486	\$465	\$420	\$429	\$405	\$409	\$426	-12.2%	-2.2%
General merchandise stores	\$1,539	\$1,538	\$1,560	\$1,530	\$1,427	\$1,415	\$1,419	-7.7%	-1.3%
Food stores	\$671	\$639	\$630	\$613	\$569	\$553	\$545	-18.8%	-3.4%
Eating and drinking places	\$1,190	\$1,192	\$1,190	\$1,184	\$1,114	\$1,111	\$1,125	-5.5%	-0.9%
Home furnishings and appliances	\$406	\$418	\$439	\$454	\$403	\$408	\$424	4.5%	0.7%
Bldg. matrl. and farm implements	\$741	\$768	\$816	\$828	\$800	\$819	\$862	16.3%	2.5%
Auto dealers and auto supplies	\$1,602	\$1,682	\$1,799	\$1,893	\$1,837	\$1,863	\$1,883	17.6%	2.7%
Service stations	\$814	\$688	\$745	\$841	\$744	\$698	\$778	-4.4%	-0.7%
Other retail stores	\$1,704	\$1,709	\$1,773	\$1,810	\$1,588	\$1,525	\$1,529	-10.2%	-1.8%
Retail Stores Totals	\$9,152	\$9,100	\$9,373	\$9,581	\$8,887	\$8,803	\$8,992	-1.7%	-0.3%
All Other Outlets	\$5,217	\$5,135	\$5,103	\$5,166	\$4,461	\$4,067	\$3,928	-24.7%	-4.6%
Totals All Outlets	\$14,369	\$14,235	\$14,476	\$14,747	\$13,348	\$12,870	\$12,920	-10.1%	-1.8%
Notes:									
(a) All figures are inflated to 2003\$ usin	-								
(b) Population figures:	1997	1998	1999	2000	2001	2002	2003		
San José	852,100	866,800	878,800	893,300	906,600	916,328	919,555		
California	32,207,000	32,657,000	33,140,000	33,753,000	34,367,000	35,048,666	35,612,116		

Sources: State Board of Equalization; CA Department of Finance; BAE, 2005.

Outlets	Santa Clara & San Mateo Counties (a)	Santa Clara County (a) S	San José (a)	Per Capita Santa Clara & San Mateo Sales (a)	Per Capita Santa Clara Sales (a)	Per Capita San José Sales (a)	San José Injection/ (Leakage)
Apparel: Women's apparel Men's apparel Family apparel Shoes Subtotal	\$356,482	\$276,276	\$98,955	\$147	\$161	\$108	-27%
	\$82,748	\$65,271	\$34,250	\$34	\$38	\$37	9%
	\$631,001	\$457,437	\$248,084	\$260	\$266	\$270	4%
	\$171,976	\$130,515	\$69,825	\$71	\$76	\$76	7%
	\$1,242,207	\$929,499	\$451,113	\$511	\$541	\$491	-4%
General Merchandise: General merchandise stores Drug stores Subtotal	\$3,285,182	\$2,250,674	\$887,882	\$1,353	\$1,309	\$966	-29%
	\$511,718	\$338,650	\$151,154	\$211	\$197	\$164	-22%
	\$3,796,900	\$2,589,324	\$1,039,036	\$1,563	\$1,506	\$1,130	-28%
Specialty Stores: Gifts, art goods, and novelties Sporting goods Florists Photo equip. and musical instruments Stationery and books Jewelry Office, store and school supplies Other specialties Subtotal	\$137,540 \$309,273 \$75,531 \$181,504 \$284,224 \$228,383 \$1,528,219 \$1,254,269 \$3,998,943	\$89,165 \$214,784 \$49,584 \$146,093 \$209,847 \$179,461 \$1,163,307 \$856,358 \$2,908,599	\$42,521 \$86,618 \$10,394 \$48,795 \$72,943 \$84,549 \$308,634 \$458,294 \$1,112,747	\$57 \$127 \$31 \$75 \$117 \$94 \$629 \$516	\$52 \$125 \$29 \$85 \$122 \$104 \$677 \$498 \$1,692	\$46 \$94 \$11 \$53 \$79 \$92 \$336 \$498 \$1,210	-18% -26% -64% -29% -32% -2% -47% -3%
Food Stores: Food stores selling all types of liquors All other food stores Subtotal	\$887,242	\$586,192	\$268,113	\$365	\$341	\$292	-20%
	\$332,461	\$233,735	\$146,425	\$137	\$136	\$159	16%
	\$1,219,703	\$819,927	\$414,539	<i>\$502</i>	\$477	\$451	-10%
Eating and drinking: Eating places: no alcoholic beverages Eating places: beer and wine Eating and drinking: all types of liquor Subtotal	\$1,076,965	\$759,945	\$368,203	\$443	\$442	\$400	-10%
	\$1,030,075	\$757,771	\$306,695	\$424	\$441	\$334	-21%
	\$983,920	\$621,612	\$220,596	\$405	\$361	\$240	-41%
	\$3,090,960	\$2,139,328	\$895,494	\$1,273	\$1,244	\$974	-23 %
Household/Home Furnishings: Household and home furnishings Household appliance dealers Subtotal	\$860,682 \$375,514 \$1,236,196	\$554,000 \$244,640 \$798,640	\$132,873 \$267,992 \$400,865	\$354 \$155 \$509	\$322 \$142 \$464	\$144 \$291 \$436	-59% 88% -14%
Building Materials: Lumber and building materials Hardware stores Paint, glass, wallpaper, plumbing & elec. Supplies Subtotal	\$1,541,993	\$929,024	\$443,368	\$635	\$540	\$482	-24%
	\$291,558	\$205,604	\$99,975	\$120	\$120	\$109	-9%
	\$278,511	\$180,053	\$37,730	\$115	\$105	\$41	-64%
	\$2,112,062	\$1,314,681	\$581,073	\$870	\$765	\$632	-27%
Automotive: New motor vehicle dealers Used motor vehicle dealers Automotive supplies and parts Service stations Subtotal	\$4,267,200	\$2,760,775	\$1,226,651	\$1,757	\$1,606	\$1,334	-24%
	\$237,988	\$163,552	\$68,974	\$98	\$95	\$75	-23%
	\$303,212	\$218,821	\$149,361	\$125	\$127	\$162	30%
	\$2,068,711	\$1,413,227	\$767,478	\$852	\$822	\$835	-2%
	\$6,877,111	\$4,556,375	\$2,212,464	\$2,832	\$2,650	\$2,406	-15%
Other Retail: Packaged liquor stores Second-hand merchandise Farm Implements (b) Farm & Garden Fuel&ice, mobile home, trailer, camper, boat Subtotal	\$192,591	\$123,713	\$51,219	\$79	\$72	\$56	-30%
	\$36,338	\$15,591	\$10,189	\$15	\$9	\$11	-26%
	\$60,422	\$51,219	\$31,428	\$25	\$30	\$34	37%
	\$142,259	\$87,671	\$20,094	\$59	\$51	\$22	-63%
	\$210,938	\$180,527	\$8,715	\$87	\$105	\$9	-89%
	\$642,548	\$458,721	\$121,646	\$265	\$267	\$132	-50%
Retail Stores Total	\$24,216,630	\$16,515,094	\$7,228,977	\$9,971	\$9,604	\$7,861	-21%

^{1,719,537} 709,236 919,555

Notes:
(a) Santa Clara County population, 2003:
San Mateo County population, 2003:
San José population, 2003:
(b) Farm implements have been combined to comply with disclosure rules for San José data.
Sources: State Board of Equalization, 2003; 2003 California Department of Finance; BAE, 2005.

	Santa Clara & San Mateo	Santa Clara		Per HH Santa Clara & San Mateo Sales	Per HH Santa Clara	Per HH San José Sales	San José Injection/
Outlets	Counties (a)	County (a)	San José (a)	(a)	Sales (a)	(a)	(Leakage)
Apparel:							
Women's apparel	\$356,482	\$276,276	\$98,955	\$424	\$474	\$345	-19%
Men's apparel Family apparel	\$82,748 \$631,001	\$65,271 \$457,437	\$34,250 \$248,084	\$98 \$751	\$112 \$786	\$120 \$866	21% 15%
Shoes	\$171,976	\$130,515	\$69,825	\$205	\$224	\$244	19%
Subtotal	\$1,242,207	\$929,499	\$451,113	\$1,478	\$1,596	\$1,574	7%
General Merchandise:							
General merchandise stores	\$3,285,182	\$2,250,674	\$887,882	\$3,910	\$3,865	\$3,099	-21%
Drug stores Subtotal	\$511,718 \$3,796,900	\$338,650 \$2,589,324	\$151,154 \$1,039,036	\$609 \$4,518	\$582 \$4,447	\$528 \$3,626	-13% -20%
Specialty Stores:							
Gifts, art goods, and novelties	\$137,540	\$89,165	\$42,521	\$164	\$153	\$148	-9%
Sporting goods	\$309,273	\$214,784	\$86,618	\$368	\$369	\$302	-18%
Florists	\$75,531	\$49,584	\$10,394	\$90	\$85	\$36	-60%
Photo equip. and musical instruments	\$181,504	\$146,093	\$48,795	\$216	\$251	\$170	-21%
Stationery and books	\$284,224	\$209,847	\$72,943	\$338	\$360	\$255	-25%
Jewelry	\$228,383	\$179,461	\$84,549	\$272	\$308	\$295	9%
Office, store and school supplies Other specialties	\$1,528,219 \$1,254,269	\$1,163,307 \$856,358	\$308,634 \$458,294	\$1,819 \$1,493	\$1,998 \$1,471	\$1,077 \$1,599	-41% 7%
Subtotal	\$3,998,943	\$2,908,599	\$1,112,747	\$4,759	\$4,995	\$3,884	-18%
Food Stores:							
Food stores selling all types of liquors	\$887,242	\$586,192	\$268,113	\$1,056	\$1,007	\$936	-11%
All other food stores	\$332,461	\$233,735	\$146,425	\$396	\$401	\$511	29%
Subtotal	\$1,219,703	\$819,927	\$414,539	\$1,452	\$1,408	\$1,447	0%
Eating and drinking:	#4 070 005	0750.045	# 000 000	#4.000	04.005	04.005	00/
Eating places: no alcoholic beverages	\$1,076,965	\$759,945 \$757,771	\$368,203	\$1,282 \$1,236	\$1,305 \$1,301	\$1,285 \$1,070	0% -13%
Eating places: beer and wine Eating and drinking: all types of liquor	\$1,030,075 \$983,920	\$757,771 \$621,612	\$306,695 \$220,596	\$1,226 \$1,171	\$1,301 \$1,068	\$1,070 \$770	-13% -34%
Subtotal	\$3,090,960	\$2,139,328	\$895,494	\$3,678	\$3,674	\$3,125	-15%
Household/Home Furnishings:							
Household and home furnishings	\$860,682	\$554,000	\$132,873	\$1,024	\$951	\$464	-55%
Household appliance dealers	\$375,514	\$244,640	\$267,992	\$447	\$420	\$935	109%
Subtotal	\$1,236,196	\$798,640	\$400,865	\$1,471	\$1,372	\$1,399	-5%
Building Materials:	¢1 541 003	#020 024	#442.260	¢4 925	C4 FOC	¢4 E47	160/
Lumber and building materials Hardware stores	\$1,541,993 \$291.558	\$929,024 \$205.604	\$443,368 \$99,975	\$1,835 \$347	\$1,596 \$353	\$1,547 \$349	-16% 1%
Paint, glass, wallpaper, plumbing & elec. Supplies	\$278,511	\$180,053	\$37,730	\$331	\$309	\$132	-60%
Subtotal	\$2,112,062	\$1,314,681	\$581,073	\$2,513	\$2,258	\$2,028	-19%
Automotive:							
New motor vehicle dealers	\$4,267,200	\$2,760,775	\$1,226,651	\$5,078	\$4,742	\$4,281	-16%
Used motor vehicle dealers	\$237,988	\$163,552	\$68,974	\$283	\$281	\$241	-15%
Automotive supplies and parts	\$303,212	\$218,821	\$149,361	\$361	\$376	\$521	44%
Service stations Subtotal	\$2,068,711 \$6,877,111	\$1,413,227 \$4,556,375	\$767,478 \$2,212,464	\$2,462 \$8,184	\$2,427 \$7,825	\$2,679 \$7,722	9% -6%
Other Retail:							
Packaged liquor stores	\$192,591	\$123,713	\$51,219	\$229	\$212	\$179	-22%
Second-hand merchandise	\$36,338	\$15,591	\$10,189	\$43	\$27	\$36	-18%
Farm Implements (b)	\$60,422	\$51,219	\$31,428	\$72	\$88	\$110	53%
Farm & Garden	\$142,259	\$87,671	\$20,094	\$169	\$151	\$70	-59%
Fuel&ice, mobile home, trailer, camper, boat, Subtotal	\$210,938 \$642,548	\$180,527 \$458,721	\$8,715 \$121,646	\$251 \$765	\$310 \$788	\$30 \$425	-88% -44%
Retail Stores Total	\$24,216,630	\$16,515,094	\$7,228,977	\$28,819	\$28,364	\$25,229	-12%

582,252 258,051

286,531

Notes: (a) Santa Clara County households, 2003: San Mateo County households, 2003:

San José households, 2003:
(b) Farm implements have been combined to comply with disclosure rules for San José data.
Sources: State Board of Equalization, 2003; 2003 California Department of Finance; BAE, 2005.